



National Roundtable on Insurance Literacy
October 15, 2008
9:00 a.m. to 5:00 p.m.
U.S. Department of the Treasury
Cash Room

- 8:30 a.m.** Registration
- 9-9:15** **Welcoming Remarks**
Dan Iannicola, Jr., Deputy Assistant Secretary for Financial Education, U.S.
Department of the Treasury
- 9:15-9:30** **Keynote Opening Speaker**
- Alex Sink, Chief Financial Officer, Florida Department of Financial Services
- 9:30-10:45** **Educating Consumers – Industry Perspective:**
Panel and Q&A
This panel will discuss how the industry ought to educate Americans about insurance, including support for financial education providers.
- Beth M. Hirschhorn, Senior Vice President and Chief Marketing Officer, MetLife
 - Shawn Hausman, Senior Vice President, Public Affairs and Publishing, American Council of Life Insurers (ACLI)
 - Marguerite Murer, Senior Vice President of Public Affairs, Property Casualty Insurers of America (PCI)
 - Robert Detlefsen, Ph.D., Vice President of Public Policy, National Association of Mutual Insurance Companies (NAMIC)
- 10:45-11:00** **Break (15 minutes)**

11:00-12:15 Best Insurance Education Practices

Panel and Q&A

This panel will cover the approaches used by established insurance education providers, as well as how mainstream financial education providers can help.

- Don Rebele, President and Chief Executive Officer, Griffith Insurance Education Foundation
- Phillip Richards, incoming Chairman of the Board, LIFE Foundation
- Jeanne Salvatore, Senior Vice President – Public Affairs, Insurance Information Institute

12:15-1:45 Lunch on Your Own

1:45-2:00 Featured Speaker

- Jill Griffiths, Aetna: Information for Consumers on Health Insurance

2:00-3:00 Face to Face with the Consumer: A Report from the Frontlines

Panel and Q&A

This panel will cover the perspective of insurance agents in educating consumers about their options, including bad decisions witnessed by agents and lessons learned.

- Alex Soto, CPCU, ARM, President, InSource Inc., representing Independent Insurance Agents and Brokers of America, Inc.
- Patricia Borowski, Senior Vice President, National Association of Professional Insurance Agents
- Robert Page, Charles A. Page and Sons Ins. Agency, Inc., Immediate Past President, National Association of Professional Insurance Agents

3:00-3:15 Break

3:15-4:30 What Americans Should Know About Insurance and Regulation

Panel and Q&A

This panel will feature a discussion among state regulators about how to best educate consumers about insurance and consumer rights.

- Scott Richardson, Insurance Director, South Carolina
- Mary Jo Hudson, Director, Ohio Department of Insurance
- Nonnie Burns, Commissioner, Massachusetts Division of Insurance
- Andrew Beal, Acting Executive Vice President and Chief Executive Officer, National Association of Insurance Commissioners

4:30-4:50 Keynote Closing Speaker:

- Edward L. Connor, Acting Federal Insurance Administrator, FEMA: Disaster Insurance Education